

**CA-PMM****Project Name:** Electronic Services Expansion Project**OCIO Project #:** 0860-091**Department:** Board of Equalization**Revision Date:** December 2009 Report**Status Report****Progress Report -- Team Member to Project Manager****Current Task Summary**

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
<b>Accomplished this week</b>			
<b>Planned/Scheduled Completion in Next Two Weeks</b>			
Status Summary	Yes/No	Explanation	
Will all assigned tasks be accomplished by their due date?			
Are there any planned tasks that won't be completed?			
Are there problems which affect your ability to accomplish assigned tasks?			
Do you plan to take time off that is not currently scheduled?			

**Status of Assigned Issues**

Issue Number	Description	Due Date	Status

**Status Report -- Project Manager to Sponsor****Current Status Report**

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	Yes			
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not planned?	No			
4. Were there any changes to scope?	No			
5. Were tasks added that were not originally estimated?	No			
6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	No			
8. Are there any new major issues?	No			
9. Are there any staffing problems?	No			

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Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		
4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		
6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	No		
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No		

**Current Status and Accomplishments:***Describe deliverables completed and milestones met during this reporting period.*

Sub Project "eFiling for Fuel Retailers and Distributors (G/SG)"

Construction Phase Completed

Integration Phase Completed

Sub Project "Electronic Registration (eReg)"

Business Requirement Document Preparation Continued

Sub-Project "eFiling for Cigarette Manufacturers/Distributors (Cig Mgr/Dist)"

Logical Phase Continued - Business Requirement Gathering Process Completed and System Requirement Gathering Process Continued

Sub Project "In State Service Business Registration and eFiling (Service Business)"

Construction Phase Completed

Integration Phase Completed

Sub Project "Special Taxes Returns"

Project Initiation Activities Continued

Sub Project "On-line Requests for Relief of Penalty/Interest, Extensions and Declarations of Timely Mailing (On-line Requests)"

Project Initiation Activities Began

Sub Project "On-line Requests for Installment Payment Agreements (On-line IPAs)"

~~Project Initiation Activities Began~~**Project Milestones:***List key milestones and their dates from the project schedule.*

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed
Service Business - Construction Phase	12/4/09	12/9/09	Complete		
Service Business - Integration Phase	12/30/09	12/30/09	Complete		
G/SG - Physical Design Phase	12/4/09	12/4/09	Complete		
G/SG - Integration Phase	12/30/09	12/30/09	Complete		

**CA-PMM****Project Name:** Electronic Services Expansion Project**OCIO Project #:** 0860-091**Department:** Board of Equalization**Revision Date:** December 2009 Report**Status Report****Variances**

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	x			
Milestones	x			
Deliverables	x			
Resources	x			
One-Time Cost	x			
Continuing Cost	x			

**Status Reports – Sponsor to Steering Committee****Summary Milestones and Highlights****Project Milestones:***List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.*

Milestone	Target Date	Forecast Date	Status	If Delayed, Impact to Implementation Date	Date Completed

**Variances**

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

\* Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	x			
Milestones	x			
Deliverables	x			
Resources	x			
One Time Cost	x			
Continuing Cost	x			

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# Status Report

## Monitoring Vital Signs Scorecard

Vital Sign	Variance	Value	Your Score
1. Customer Buy-In	High Degree of Buy-In	0	0
	Medium Degree of Buy-In	1	
	Low Degree of Buy-In	2	
2. Technology Viability	Strong Viability	0	0
	Medium Viability	1	
	Weak Viability	2	
3. Status of the Critical Path (delay)	<5%	0	0
	5% to 10%	1	
	>10%	2	
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	0
	5% to 10%	1	
	>10%	2	
5. High-Probability, High-Impact Risks	0 to 3	0	1
	4 to 6	1	
	>6	2	
6. Unresolved Issues (on time resolution)	On time	0	0
	Late with no impact	1	
	Late impacting the critical path	2	
7. Sponsorship Commitment	Fully engaged	0	0
	Partially engaged	1	
	Inadequate engagement	2	
8. Strategy Alignment	Strong alignment	0	0
	Partial alignment	1	
	Weak or no alignment	2	
9. Value-to-Business	Strong	0	0
	Medium	1	
	Weak	2	
10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	1
	Medium	1	
	Weak	2	
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	0
	80-90% on time	1	
	<80% on time	2	
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	0
	80-90% on time	1	
	<80% on time	2	
13. Actual vs. Planned Resources	>90% assigned and available	0	0
	80-90% assigned and available	1	
	<80% assigned and available	2	
14. Overtime Utilization (% of effort that is overtime)	<15%	0	0
	15-25%	1	
	>25%	2	
15. Team Effectiveness	Highly Effective	0	0
	Moderately Effective	1	
	Ineffective	2	
<b>Total</b>			<b>2</b>

Green = 0 - 8  
Yellow = 9 - 19  
Red = 20+

### Vendor Viability Rating Rationale

The ESEP project team is comprised of BOE staff and a large number of contract resources (system analysts, programmers, Technology Project Manager). BOE systems are complex by nature and as such the learning curve will be greater for some contract resources especially for those that do not have prior BOE experience. The majority of the contract resources possess the necessary skill sets and are developing the knowledge base necessary to perform assigned tasks proficiently. The Technology Project Manager has prior BOE experience and is already performing at a high level of proficiency.